

The Federal Technology Center

Presents

Responding to RFPs*

*Request for Proposal

All you have to do is...

- Find an appropriate RFP
- Read it and decide whether or not to propose
- Provide a responsive proposal
- Submit your proposal on time
- Negotiate an agreement
- Win or lose – get feedback

EASY, Right?!

✓ Find an RFP

- Definition of an RFP*

A solicitation document used in negotiated procurement when the buyer reserves the right to award without further oral or written negotiation. Only the acceptance of the buyer is required to create a binding contract. The buyer can choose to negotiate further at its option.

**Desktop Guide to Basic Contracting Terms, National Contract Management Association*

✓ Review the Solicitation

- Purpose of the review is to reach a “propose/no propose” decision
- Determine if there is a history of past contracts for this work and request it from the contracting officer or buyer
 - Dates of previous contracts
 - Name of contractor
 - Quantity purchased
 - Unit price
 - Total price

RFP Format

- Follow JPL's format
- The basic subject matter includes
 - Schedule (description and your price)
 - Terms and Conditions
 - Instructions

Example of Federal Format

Uniform Contract Format - FAR 15.204-1(b)

Part I -- The Schedule

- A. Solicitation/contract form
- B. Supplies or services and prices
- C. Description/specifications (full text is often in attachments)
- D. Packaging and marking
- E. Inspection and acceptance
- F. Deliveries or performance
- G. Contract administration data
- H. Special contract requirements

Part II -- Contract Clauses

- I. Contract clauses

Part III -- List of Documents, Exhibits, and Other Attachments

- J. List of documents, exhibits, and other attachments

Example of Federal Format Uniform Contract Format - FAR 15.204-1(b)

Part IV – Representations and Instructions

- K. Representations, certifications, and other statements of offerors (Jan 1 2005, replaced by ORCA*)
 - L. Instructions, conditions and notices to offerors or respondents
 - M. Evaluation factors for award
 - Always read first!
- Sections K, L, and M do not become part of the contract

Note: * ORCA = Online Representations & Certifications Application
(<http://orca.bpn.gov/>)

✓ Define the Scope of Work

- Determine your eligibility – can you meet the evaluation criteria?
 - Past performance
 - Required experience
 - Skill sets
 - Production capability
 - Production capacity
 - Schedule and period of performance

Define the Scope of Work (Cont.)

- For commodities
 - Manufactured
 - Material costs and schedules for acquiring raw materials
 - Labor costs – remember that JPL expects your preferred customer rates
 - Review drawings
 - Administrative needs, i.e. billing, creation of shipping documents, status reports, scheduling inspections

Define the Scope of Work (Cont.)

- Commodities continued
 - Non-manufactured
 - Lead time from distribution source
 - Shipping issues – drop ship directly to final location, or sent to you and then to delivery point
 - Administrative needs, i.e. billing, creation of shipping documents, status reports, scheduling inspections

Define the Scope of Work (Cont.)

- For services
 - Determine skill sets, including subcontracted work
 - Estimate number of hours required for each skill set, using the work statement as guidance
 - May want to establish a high, moderate and low range
 - Review rates for each skill set

Define the Scope of Work (Cont.)

- Services continued
 - Get subcontractors' billing rates and adjust for any markup that will be applied by your company
 - If past contract information is available, determine if the rates you will need to charge seem competitive, once you've adjusted for time, value of money, and scope (estimated number of hours for previous contract)

Define the Scope of Work (Cont.)

- Services continued
 - Sharpen your pencil!
 - JPL expects to be your most favored customer because it performs government contracts
 - Discount your commercial prices or rates
 - Don't assume you will be able to offer a reduction during negotiations. The contracting officer may make an award *without* conducting negotiations

✓ **Decide to “Propose / No-Propose”**

- Make “propose/no propose” decision
 - Select Proposal Developmental Team
 - Part of your review should include an estimated proposal development budget
 - Proposal costs are a “cost of doing business” and will not be recovered, especially if you don’t win the contract
 - Determine a “break-even” amount for your costs

Make a Commitment

- You are committing your company's
 - Time
 - Money
 - Personnel
 - For many, an emotional investment, too
- Therefore, you and your proposal development team *must* be fully invested in your success

✓ Build a Requirement Matrix

Solicitation Page	Requirement	Proposal Page	Response

Pay Attention to Details

- Evaluate the work to be done relative to your company's capabilities
 - Experience and skills
 - Past performance
 - Capacity or time available
 - Financial capability
 - Ability to get required inventory
- Are submittals required?

Pay Attention to Details (Cont.)

- Administrative needs
 - Reports
 - Invoicing
- Travel and per diem expense
- Will there be subcontracted work?
 - Will you need to “flow-down” clauses to your subcontractors?
- Schedules and deadlines

Pay Attention to Details (Cont.)

- Instructions for proposal
 - Number of copies
 - Page limits (fold-outs, artwork, double columns)
 - Formats
 - Sequencing
 - Site visits (mandatory or non-mandatory)
 - Pre-proposal conferences, including attendance requirements
 - Deadline for questions to the contracting officer
 - Due dates and times

Meet with Proposal Team

- Distribute copies of RFP for review before your meeting
- Discuss requirements
- Make a proposal development timeline
- Discuss proposal development budget
- Establish a team leader, through whom all documents and revisions will clear

Meet with Proposal Team (Cont.)

- Create subordinate teams, if required
- Begin collecting questions, if any, for the contracting officer
- Discuss need, if any, for subcontractors

Meet with Proposal Team (Cont.)

- Review any proprietary issues and how they will be handled within the proposal
- Review any actual or potential legal issues – seek counsel, as needed
- Plan for pre-proposal events and notify JPL of plan to attend
- Schedule check-in with team members – for some teams, daily is recommended

Establish a War Room

- May be an actual or virtual war room
 - Shared files – develop a file plan
 - Read/write privileges
 - Passwords?
 - Keep all work! Even that which you will reject
 - Future revisions
 - Negotiation alternatives
 - Alternate proposals
 - Post award – change orders
 - Proof of work, if required, for legal purposes

Subcontractors' Input

- Provide copies of their section(s) of RFP to them
- Determine if exclusive agreements or non-disclosure agreements are needed
- Share proposal development schedule
- Establish deadline for their propose/no propose decision

Subcontractors' Input (Cont.)

- Establish a proposal deadline that allows for timely incorporation of their information in your final proposal
- Determine if subcontractor(s) will attend pre-proposal events and who will cover the costs

Develop a Strategy

- What are the major issues that must be addressed and developed?
- What are the features of your product or service?
- What are the benefits derived from the features of your product or service?
- What creates a distinction between you and your competitors?
- Why should JPL choose YOU instead of your competitors?

Develop a Strategy (Cont.)

- What is the strategy or theme that you will use for
 - The proposal as a whole
 - Each volume* (management, technical, cost)
 - Each major section* within each volume, including volume summaries and an Executive Summary
 - Determine the relative time and space devoted to each section, based on the “weight” assigned to each section for evaluation purposes

*If applicable

Develop a Strategy (Cont.)

- Your goal is to explain to JPL why you have the winning proposal
 - You must win in each volume and section by being clear about how your solutions will be implemented
- “Freeze” your concept to ensure consistency between your departments and volume writers
- Select one editor who finalizes all text to ensure
 - Consistent content
 - Consistent format
 - One “voice”

Complete Your Proposal

- Attention to details
- Follow the format established by JPL
- Fill in all required information
- Use a cover letter to describe what is included in your submittal
- Clearly mark and cross-reference any exhibits or attachments you create

Complete Your Proposal (Cont.)

- Create a glossary or definitions page if needed for acronyms and jargon
 - Use plain English whenever possible
- Documents must be neat and legible
- Do not submit information that is not requested
- Ensure that your work descriptions are factual, as opposed to marketing information

Complete Your Proposal (Cont.)

- Check and double-check your math for your unit prices and total prices – awards are based on unit prices
- Do not submit cost breakdowns unless required by the solicitation
- Review your requirements matrix and annotate where in your proposal each requirement is addressed
- Verify that information that appears in more than one location is consistent

Complete Your Proposal (Cont.)

- Verify that you have complied with any solicitation amendment requirements
- Submit required number of copies
- Submit on time using required method – fax, electronic, hard copy, combination with “wet” signature
- Use a trusted courier with tracking capability
 - Late proposals will not be considered

✓ Prepare for Negotiation

- A communication process between the buyer and seller
- Exchanges with the intent of allowing the offeror to revise its proposal
- Negotiation topics may include
 - Specific cost elements
 - Look at bottom line price
 - Contract type
 - Terms and conditions
 - Other non-cost or price factors

Prepare for Negotiation (Cont.)

- Negotiation Process Steps
 - Fact Finding
 - Prepare for Negotiation
 - Negotiation
 - Post Negotiation
 - Document results
 - Lessons learned
 - Contract Award

✓ **Conduct Negotiation**

- May be via telephone or face-to-face
- JPL prepares the agenda and may use one person or team approach
- Opening statements
 - Verify negotiator's authority
 - Synopsis of requirement
 - Element-by-element discussions

Conduct Negotiation (Cont.)

- Prepare a “best and final” offer
 - Review all details as though this were the original proposal
 - Don’t make assumptions about accuracy or completeness
 - Deadlines are usually short – submit on time

Conduct Negotiation (Cont.)

- Maintain open communications
 - Minimize “game-playing”
 - Stress cooperation
- The desired result at the conclusion of negotiations is a fair and reasonable price for both parties
- Document the results
 - The negotiation session
 - The agreements and disagreements

✓ Request Debriefing

- If the contract is awarded to you
 - Your winning proposal's strengths
 - Your winning proposal's areas for improvement
- If the contract is not awarded to you
 - Proposal strengths and weaknesses
- Win or lose – create a “lessons learned” document with your team

✓ **Contract Awarded**

- Attend post-award meeting, if any
 - Clarifications
 - Points of contact
- Begin performance
 - Excellent documentation
 - Safety
 - Quality
 - On time delivery or performance

Contract Awarded (Cont.)

- Administratively
 - Excellent documentation
 - Proactive communication with your contacts
 - Perfect invoicing procedures and documentation
 - Ensures timely payment

✓ **Contract Close-out**

- Verify that all deliverables are final
- Receive JPL's acceptance document
- Submit final invoice, including final invoices from subcontractors
- Sign any release forms
- Note document retention expiration date
- Create "lessons learned" document for contract file

Helpful Websites

- JPL Home Page
 - <http://www.jpl.nasa.gov/>
- JPL Acquisition Division
 - <http://acquisition.jpl.nasa.gov/default.htm>
- JPL Business Opportunities Office
 - <http://acquisition.jpl.nasa.gov/boo>
- JPL Terms and Conditions
 - <http://acquisition.jpl.nasa.gov/e2000.htm>

Helpful Websites (Cont.)

- JPL Forecasts
 - <http://acquisition.jpl.nasa.gov/boo/forecast2000.htm>
- JPL RFPs
 - <http://acquisition.jpl.nasa.gov/rfp/>
- NASA
 - <http://www.nasa.gov/>
- Federal Acquisition Regulation (FAR)
 - <http://farsite.hill.af.mil/vffara.htm>
 - <http://www.acqnet.gov/far/>
- NASA FAR Supplement
 - <http://farsite.hill.af.mil/vfnasaa.htm>

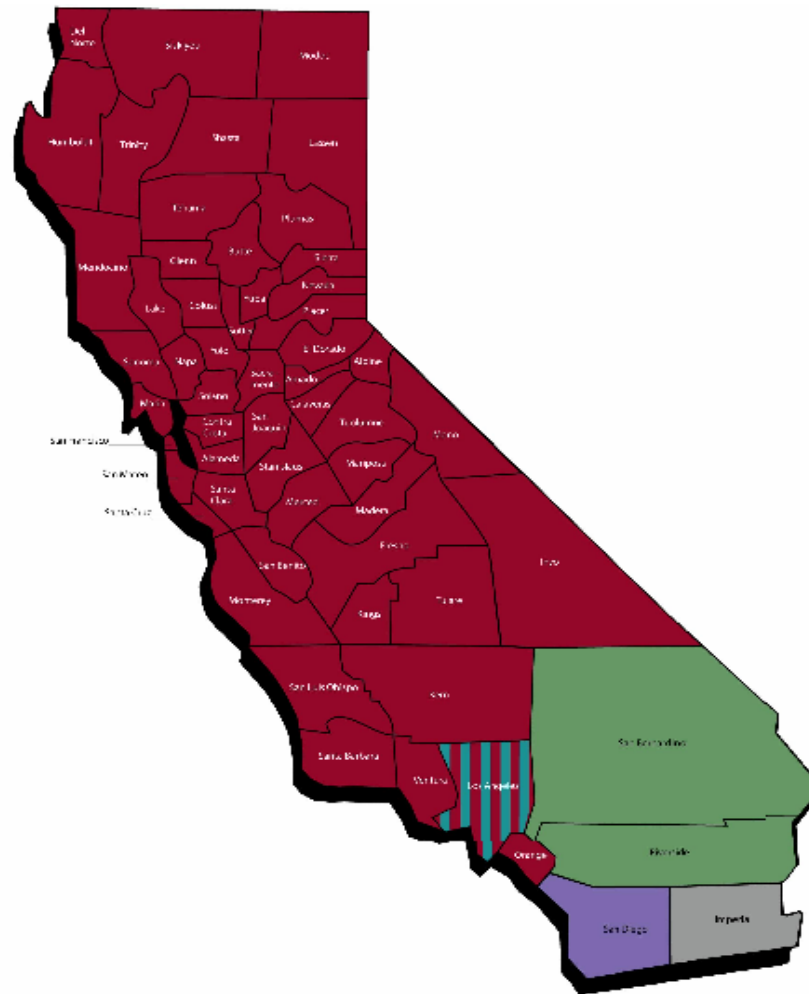
Helpful Websites (Cont.)

- Dun and Bradstreet (DUNS)
 - <http://www.dnb.com>
- Central Contractor Registration (CCR)
 - <http://www.ccr.gov>
- Federal Business Opportunities
 - <http://www.fedbizopps.gov>
 - Go to Find Business Opportunities
 - Type in NASA or JPL into search engine
 - On next screen review prime and subcontractor opportunities
- Small Business Administration (SBA)
 - <http://www.sba.gov/>

The FTC

- Not-for-profit organization public benefit corporation
- Promotes economic development by helping small businesses successfully compete for federal, state, and local government contracts

The FTC Service Area



Services from The FTC

- One-to-one Counseling - free
- Certification Information - free
- Training – free
- Assistance with GSA schedules - free
- Bid-Matching Service - \$199 a year

The FTC Staff

Points of Contact

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Thank You!

Questions?
Comments?